

## KEEPING ADDRESSES CURRENT IS IMPORTANT

PERSI prides itself on providing a high level of customer service. Every attempt is made to get timely information to our members. But alas, there's a glitch. We receive an extraordinary amount of returned mail. When this happens, we dedicate our resources to the time-consuming task of identifying the member's employer, then contacting the employer to get a current mailing address. In some cases, we must resend the mail, which means doubling our efforts in both time and expense. Multiply this effort by several hundred, and you understand our concern. Because our records are not up-to-date, we are unable to get newsletters, statements, 1099s, and other important materials to members.

When employers using PETRA know of an address change, they can simply edit the employee's detail record by typing in the new address. Employers who submit paper reports should write the new address on their report and mark it "Address Change." Employers who report electronically can update the information in their payroll system,



*PERSI's Stacey Hofmann is overwhelmed by the hundreds of pieces of undeliverable mail recently returned to PERSI.*

which should be programmed to automatically update the records on their next transmittal.

Please help PERSI keep its records current by submitting an address change whenever an employee moves, and by reminding your employees to always give your payroll department their most current address.

## EMPLOYER MEETINGS OFF TO A GREAT START

This year's employer meetings got off to a rip-roaring start on April 18th, with more than 50 people attending the initial meetings in Boise. PERSI was ecstatic about the turnout; after all, the more employers we reach, the more informed we all become.

The agenda for the meetings includes the changes at PERSI, the employer service center, legislative updates, a *back to basics* segment on the Base and Choice Plans, and sick leave

issues. Employers at the initial meetings listened, learned, and asked plenty of questions. At the conclusion of all the meetings in June, the topics held for follow up will be addressed in an issue of News To Use.

If you plan on attending a meeting, please be sure to contact Jami Davis at (208) 287-9250 or by email at [jdavis@persi.state.id.us](mailto:jdavis@persi.state.id.us) to RSVP. This will help ensure adequate seating and materials for every attendee. We hope to see you there!

May and June  
Employer Meeting Dates

Date	City
May 2	Sandpoint
May 3	Coeur d'Alene
May 4	Lewiston
May 17	Idaho Falls
May 18	Pocatello
May 19 *	Twin Falls
June 6	Grangeville
June 7	McCall

*\*New Location: Red Lion*

# TIME LIMITS ON FILING FOR PERSI DISABILITY BENEFITS



Effective July 1, 2006, PERSI members applying for disability benefits have a limited period of time to file an application. Until now, there has not been a deadline for applying for disability retirement. As a result, inactive members were able to apply at any time if they could demonstrate they became permanently and totally disabled while still an active member. Under the new law, inactive members applying for PERSI disability benefits are required to file their application no later than one year after their last physical day on the job. PERSI is interpreting “last day physically on the job” to be the day the member ceases to be an active member. Members go from being active to inactive when they are no longer eligible to accrue service and make contributions.

Don't Wait: In some cases, the one year count down for applying for benefits could begin while a member is receiving benefits from worker's compensation or short-term disability plans. Members who believe they are eligible for PERSI disability retirement should not wait until other benefits end to apply for PERSI disability benefits or they may miss the deadline for applying. When possible, members should file their application before terminating employment or shortly thereafter.

Employers with employees experiencing disabilities should also be aware of the deadline and work with their employees on their employment status.

Grace Period: Members who are inactive prior to July 1, 2006, will have a one-year grace period (until June 30, 2007) to apply for PERSI disability retirement. Applying for disability retirement merely initiates the process, it does not guarantee approval. In all cases, as part of the review process members must meet the applicable disability standard while an active member.

---

## Notes

PERSI's Chief Investment Officer [Bob Maynard](#) served as co-chair and moderator at the Alpha Max 2006 conference held in Barcelona, Spain. Investment industry experts from around the world gathered for three days to discuss ways to reach long-term investment goals and to explore return-enhancing products for institutional portfolios.

Choice Plan Manager [Diane Berg](#) and Retirement Specialist [Lisa Conn](#) were accepted into the state's Certified Public Manager Program, a nationally accredited training and development program for public sector managers and supervisors in Idaho.

Retirement Specialist [Julisa Adams](#) will soon stop calculating retirement benefits for members and take on a research analyst/data quality role with PERSI. In this new position, she will be overseeing the quality of data coming into the PERSI system and fixing existing data that may be bad. She already holds a bachelor's degree in English, and is working on a degree in Computer Science (systems analyst) through the University of California.

Coeur d'Alene Retirement Specialist [Kari Caven](#), currently a student at the Boise Bible College in Post Falls, spent a week in Charlotte, North Carolina, completing her orientation with United World Mission. After completing her education and training, Kari will go to France as a missionary. She expects to remain at PERSI for at least 2 more years.